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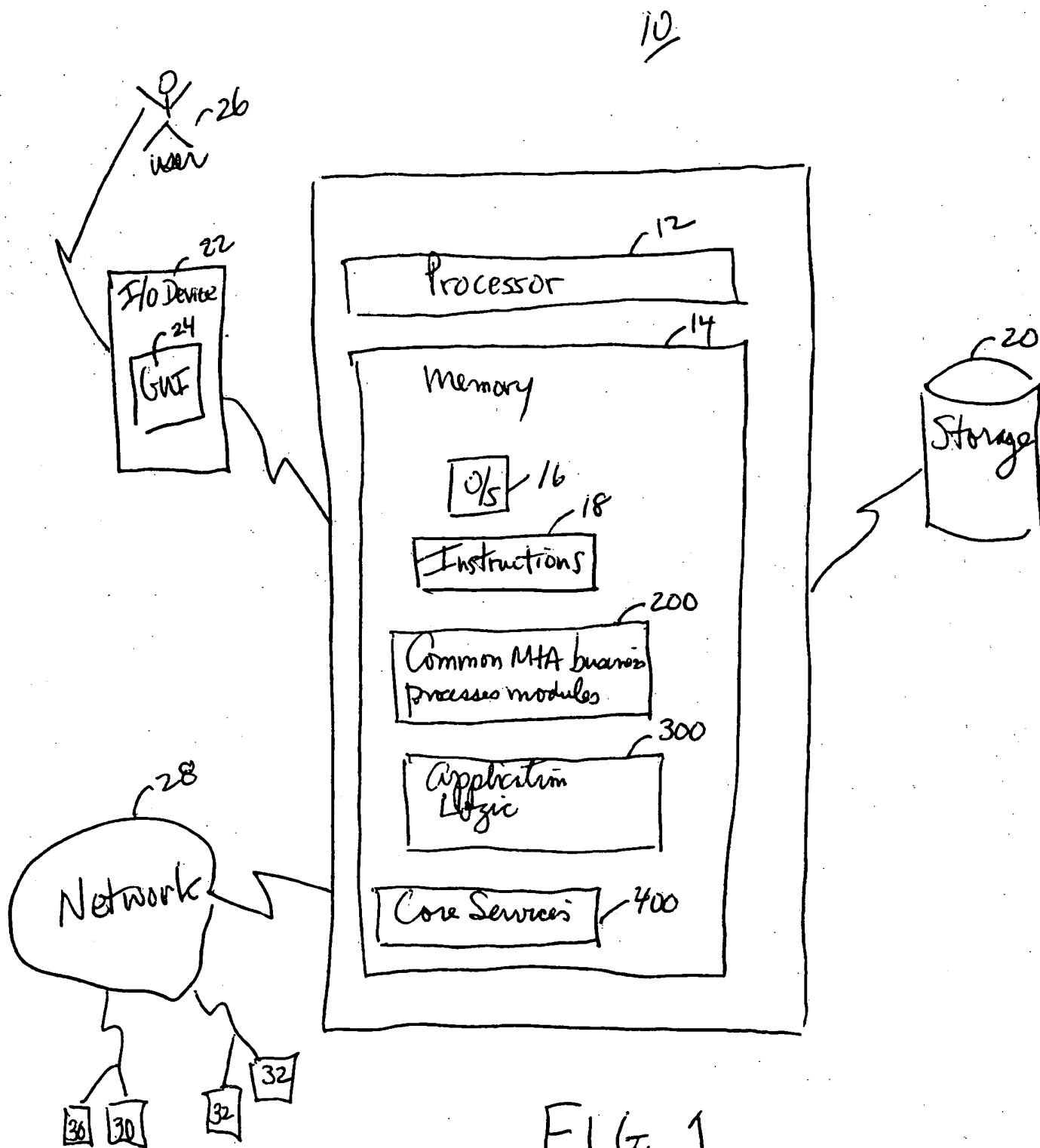


FIG. 1

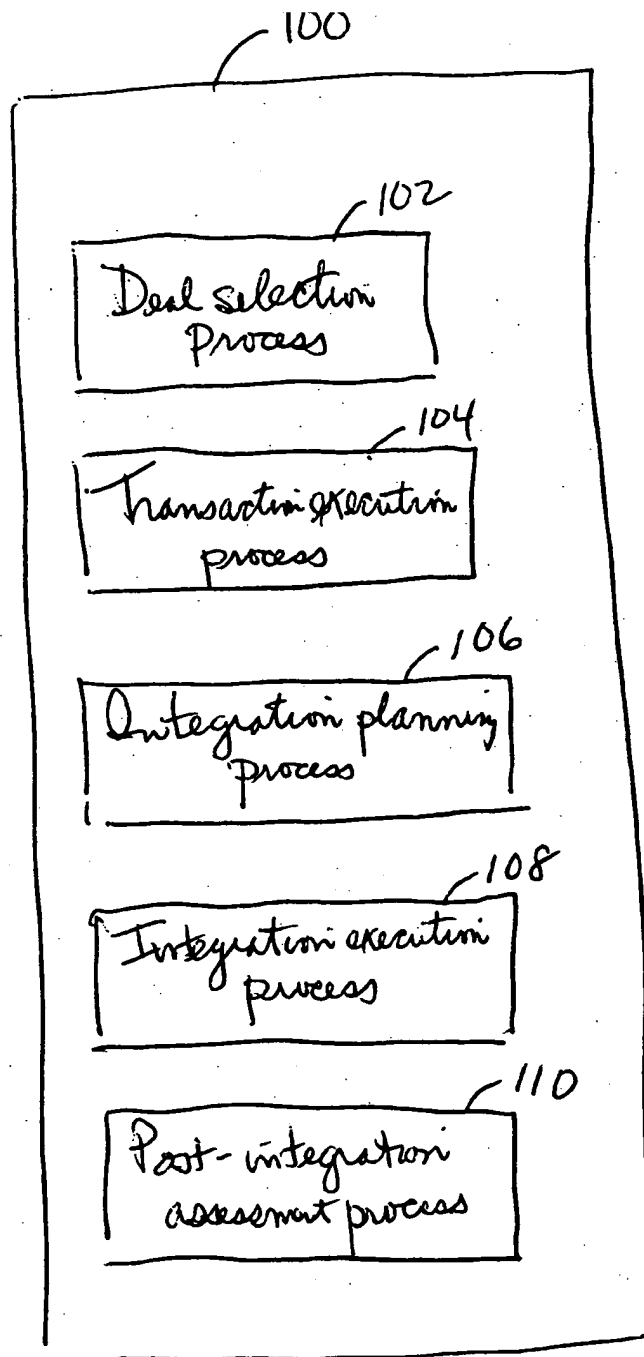


FIG. 2

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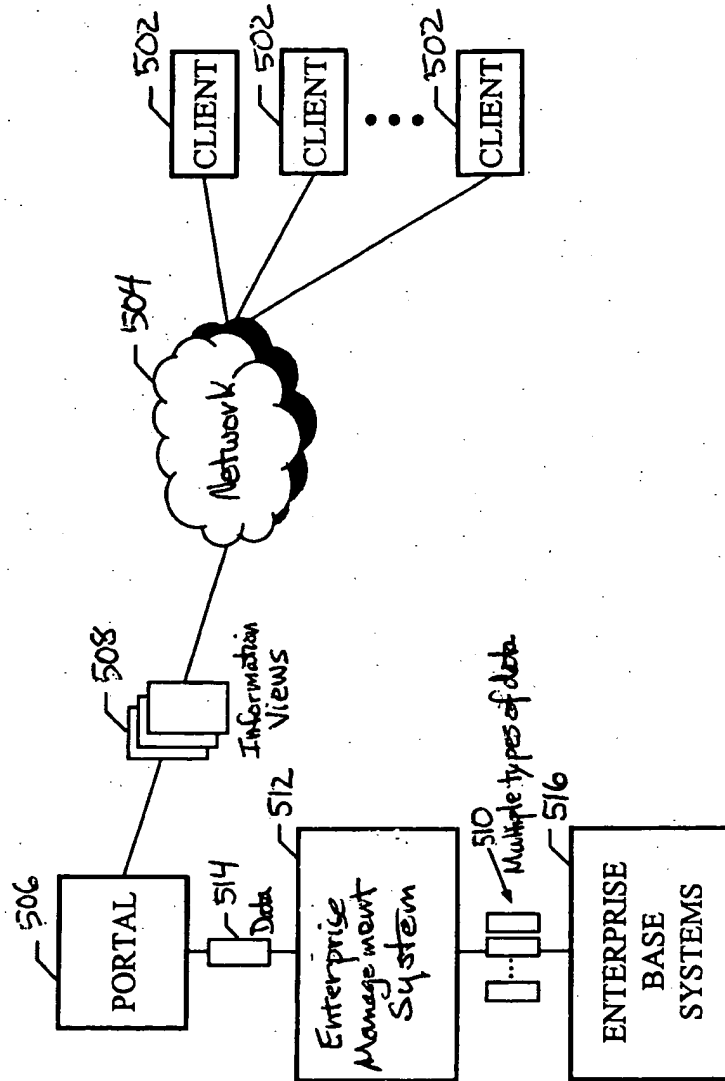
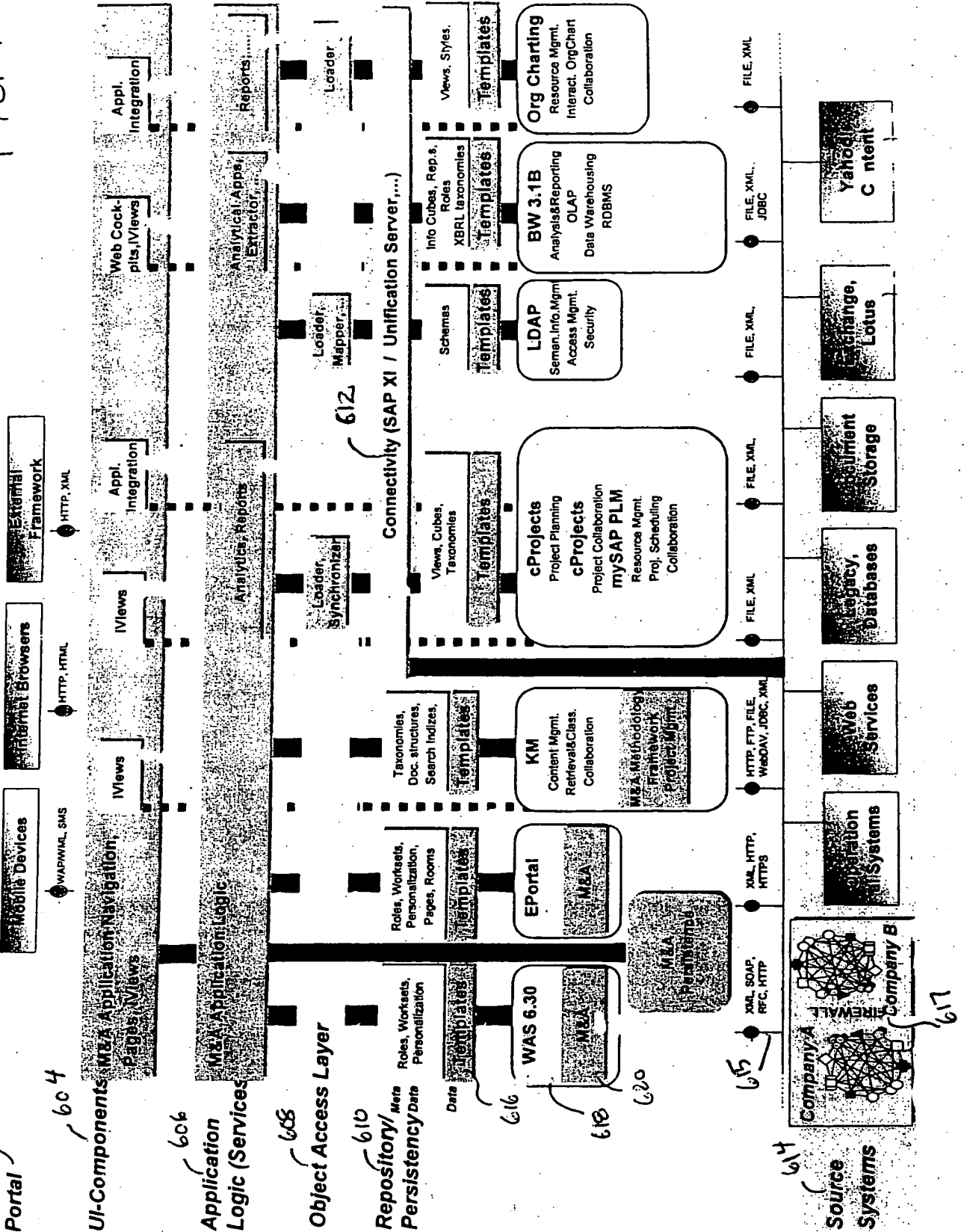


FIG. 3

FIG. 4

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Marine Systems Inc.

Customer Transition

Search

Filters | Advanced

Actions

Set-up a meeting

Start a discussion thread

Build an Org Chart

Manage Subscriptions

Member Portal Help

Team

1296- (9)

Manage Team Members

☒ Jack Black

(252) 555-1212

☒ Donna Shone

(252) 555-1212

☒ Norman Ballard

(252) 555-1212

☒ Kai Ma

(252) 555-1212

Help

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables

Sales Task Force

Account Transition Rollout

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Marine Systems Inc. **Welcome, J.J. Martin Personnel**

Home Account Consolidation Customer Transition File Sharing Discussion Calendar Deliverables

Account Consolidation: 8 Client Item Only -1317

Account Profile: Speedal Western Region Top 100 Accts

Speedal, Inc. 1320 1330 1334 1336

Rank Account -1332

Rank	Account	Value	Executive
1	West Marine Inc. -1339	17.50M	Joe Dylan -1338
2	Newport Ship Yards	6.15M	Mark Quatrone
3	Deve's Ways	5.81M	Michelle Carter
4	Godd Rock Ship Yard -1337	5.14M	Jordan McGee
5	Victory Island Yachts	3.80M	(pending)
6	Sydney Sailing Group	3.74M	David Brent

Marine Systems

Rank	Account	Executive
2	West Marine Inc. -1339	Allen Maxwell JHHS Cooperative -1341
12	Newport Ship Yards	Donald Badler
3	Deve's Ways, Inc. (H)	Alice Wendel
1	Godd Rock (H) -1344	Jon Ferrel
5	Victory Islands Yachts	Karl Hope
(n/a)	(no match) (H)	(n/a)

Accounts Addressed: 1 of 12
Assignment -1347

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Schedule Rollout

1420 Template: -1425

1431 Status: Action Item -1432

1432 Notify AEs of account assignment -1440

1433 AE Personalized Communication -1442

1434 Customer Communication -1444

1435 Cross-Selling Pro-Rolling Buyers -1446

1436 Retention Plan -1448

1437 Notify AEs of Account Assignment - 440

1450 -1452

Notification Template: -1447

1445

Dear Account Executives,
 Due to the acquisition of Marine Systems, we have consolidated client accounts which have counterparties in both companies. The decision was made based on numerous factors.

1462 Send to: -1470

1464 Trigger Date: + days

1466 Response Due: + days

1469 Exceptions: via -1472

1475

1430 Account West Marine, Inc.

Exception Handling -1436

Action	Template	Owner	Due
Auto Email -1435	(define)	System	(define)
User Action -1437	(define)	System	(define)
Auto Email -1438	(define)	System	(define)
Auto Email -1439	(define)	System	(define)
Auto Email -1440	(define)	System	(define)

FIG. 8

1600

1605 Action Planning Special Western Region Top 49% Accs

1620 Start Notification

1622 Add New Action Item Save Reference Model -1624

1631 Status Action Item -1632

* Account consolidation & assignment -1640	Type -1635	Template -1638	Owner -1633	Due -1634	(due dates est based on deal roll-out)
* AE Personalized Communication -1442	Auto Email -1637	[define]	--	Mar. 03, 2003	[define]
* Customer Communication -1444	User Action	[define]	System	Feb. 18, 2003	[define]
* Cross-Sell Opportunities -1646	Communication	[define]	--	Mar. 18, 2003	[define]
* Retention Plan -1448	Cross-Sell	[define]	--	Mar. 12, 2003	[define]
	User Action	[define]	--	Mar. 20, 2003	[define]

1625 [icon] [icon] [icon] 1627 1629

1640 Account Consolidation & Assignment

1650 [Save] [Cancel] -1652

Notification Template: 1645

Standard Notification -1647

Dear Account Executives,
 Due to the acquisition of Marine Systems, we have consolidated client accounts which have counter-parts in both companies. The decision was made based on numerous factors.

1662 Send to: -1670

1664 Trigger Date: Day 1 + 0 Days

1667 Response Due: Day 1 + 3 Days

1668 Exceptions: Alert me via Email

1672 1675

Accounts Addressed/Consolidated 1 of 12
 → Go to Account Consolidation

1692 1684

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FIG. 9

1316 Account Consolidation: Special Western Region Top 10% Assets
Special, Inc. -1330

Rank	Account	-1332	Value	Executive	1336	Marine Systems	-1340
1	West Marine Inc.	-1339	17.50M	Joe Dylan	-1338	2	West Marine Inc.
2	Newport Ship Yards		6.15M	Mark Quabone		12	Newport Ship Yards
3	David's Ways		5.81M	Michelle Carter		3	David's Ways, Inc. (M)
4	Gold Rock Ship Yard		5.14M	Jordan McGee		1	Gold Rock (M)
5	Victory Island Yachts		3.80M	(pending)		5	Victory Islands Yachts
6	Sydney Sailing Group		3.74M	David Brent		(n/a)	(no match) (M)

Rank 2 Executive 1347 Assignment 1341
Accounts Addressed: 1 of 12

1317 Accounts Addressed: 1 of 12

Rank	Account	-1346	Value	Executive	1347	Assignment	1341
1	West Marine Inc.	-1349	17.50M	Allen Maxwell	-1349	2	West Marine Inc.
2	Newport Ship Yards		6.15M	Donald Baxter		12	Newport Ship Yards
3	David's Ways		5.81M	Alice Wendel		3	David's Ways, Inc. (M)
4	Gold Rock Ship Yard		5.14M	Jon Ferrel		1	Gold Rock (M)
5	Victory Island Yachts		3.80M	Karl Hope		5	Victory Islands Yachts
6	Sydney Sailing Group		3.74M	(n/a)		(n/a)	(no match) (M)

Rank 2 Executive 1347 Assignment 1341
Accounts Addressed: 1 of 12

1339 West Marine, Inc. 1711 1712
DUNS 843-2081-22 Customer Contact: James Ferguson 1713

1340 Accounts Addressed: 1 of 12

Rank	Account	-1340	Value	Executive	1341	Assignment	1341
1	West Marine Inc.	-1343	17.50M	Joe Dylan	-1343	2	West Marine Inc.
2	Newport Ship Yards		6.15M	Mark Quabone		12	Newport Ship Yards
3	David's Ways		5.81M	Michelle Carter		3	David's Ways, Inc. (M)
4	Gold Rock Ship Yard		5.14M	Jordan McGee		1	Gold Rock (M)
5	Victory Island Yachts		3.80M	(pending)		5	Victory Islands Yachts
6	Sydney Sailing Group		3.74M	David Brent		(n/a)	(no match) (M)

Rank 2 Executive 1347 Assignment 1341
Accounts Addressed: 1 of 12

1341 Accounts Addressed: 1 of 12

Rank	Account	-1341	Value	Executive	1342	Assignment	1342
1	West Marine Inc.	-1342	17.50M	Joe Dylan	-1342	2	West Marine Inc.
2	Newport Ship Yards		6.15M	Mark Quabone		12	Newport Ship Yards
3	David's Ways		5.81M	Michelle Carter		3	David's Ways, Inc. (M)
4	Gold Rock Ship Yard		5.14M	Jordan McGee		1	Gold Rock (M)
5	Victory Island Yachts		3.80M	(pending)		5	Victory Islands Yachts
6	Sydney Sailing Group		3.74M	David Brent		(n/a)	(no match) (M)

Rank 2 Executive 1347 Assignment 1341
Accounts Addressed: 1 of 12

1342 Accounts Addressed: 1 of 12

Rank	Account	-1342	Value	Executive	1343	Assignment	1343
1	West Marine Inc.	-1343	17.50M	Joe Dylan	-1343	2	West Marine Inc.
2	Newport Ship Yards		6.15M	Mark Quabone		12	Newport Ship Yards
3	David's Ways		5.81M	Michelle Carter		3	David's Ways, Inc. (M)
4	Gold Rock Ship Yard		5.14M	Jordan McGee		1	Gold Rock (M)
5	Victory Island Yachts		3.80M	(pending)		5	Victory Islands Yachts
6	Sydney Sailing Group		3.74M	David Brent		(n/a)	(no match) (M)

Rank 2 Executive 1347 Assignment 1341
Accounts Addressed: 1 of 12

1343 Accounts Addressed: 1 of 12

Rank	Account	-1343	Value	Executive	1344	Assignment	1344
1	West Marine Inc.	-1344	17.50M	Joe Dylan	-1344	2	West Marine Inc.
2	Newport Ship Yards		6.15M	Mark Quabone		12	Newport Ship Yards
3	David's Ways		5.81M	Michelle Carter		3	David's Ways, Inc. (M)
4	Gold Rock Ship Yard		5.14M	Jordan McGee		1	Gold Rock (M)
5	Victory Island Yachts		3.80M	(pending)		5	Victory Islands Yachts
6	Sydney Sailing Group		3.74M	David Brent		(n/a)	(no match) (M)

Rank 2 Executive 1347 Assignment 1341
Accounts Addressed: 1 of 12

1344 Accounts Addressed: 1 of 12

Rank	Account	-1344	Value	Executive	1345	Assignment	1345
1	West Marine Inc.	-1345	17.50M	Joe Dylan	-1345	2	West Marine Inc.
2	Newport Ship Yards		6.15M	Mark Quabone		12	

FIG. 10

1815 1208 1800 1202

Marine Systems Inc. Welcome, J.J. Martin Personalize

Home • Sales Integration • Transition Cockpit • File Sharing • Discussion • Calendar • Deliverables

Action Planning • Special Western Region Top 10% Accts -1605

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FIG. 11

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1940 [Business Model - Strategy \(6\)](#)

1947

1950 [Organization \(3\)](#)

1960 [Human Resources - Personnel \(10\)](#)

1970 [Integration Team \(2\)](#)

1. Who are the members of the steering committee?

2. Who are the members of the project management office? (project refers to the integration process)

1925 1922 HELP

Business Model/Strategy

1. It is hard to say at this point what the impacts of the combination of both companies will have on such issues such as licensing. We will establish an integration project team that will be made up of specialized task.

Answer: It is hard to say at this point what the impacts of the combination of both companies will have on such issues such as licensing. We will establish an integration project team that will be made up of specialized task forces which will identify and address these kinds of issues to deliver proposals to the Steering Committee, which will make a final decision. The Steering Committee includes representatives from both companies.

1927 1929

Fig. 12